

LESSON 02


Folder Navigation & Document Handling

Objectives

This lesson demonstrates ways of navigating through the folders in the Projects View along with document handling. At the completion of this lesson, the participant will be able to:

- Create a folder within a project
- Add a file to a folder
- Download a file from WEBCM folder to your computer

Create a Folder

- From the Favorites menu, select
- 
- If you see the login window, enter your user ID and password provided for this training session.



Product Information

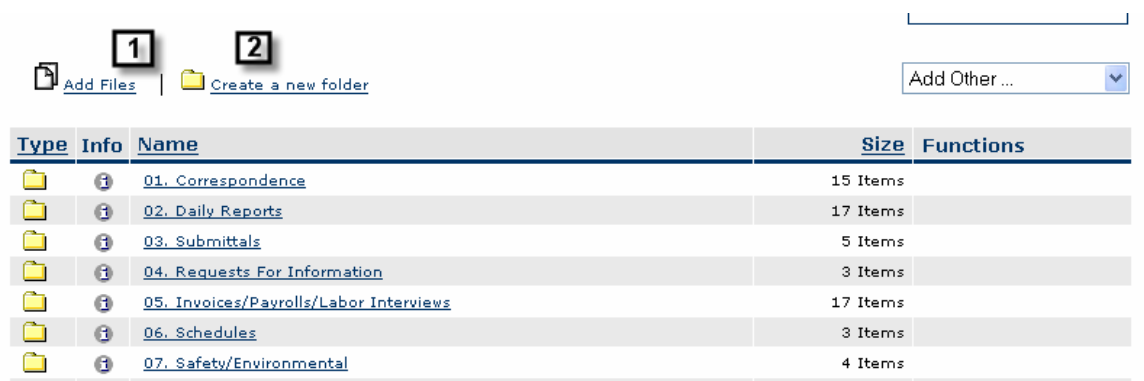
User ID:

Password:

[Log In](#) [Help](#)

[Forgot your user ID or password?](#) | [Register as a new user](#) | [Bookmark this page](#) | [Hosting provider information](#)

- You should be able to see all folders [before you were not able to see some folders]

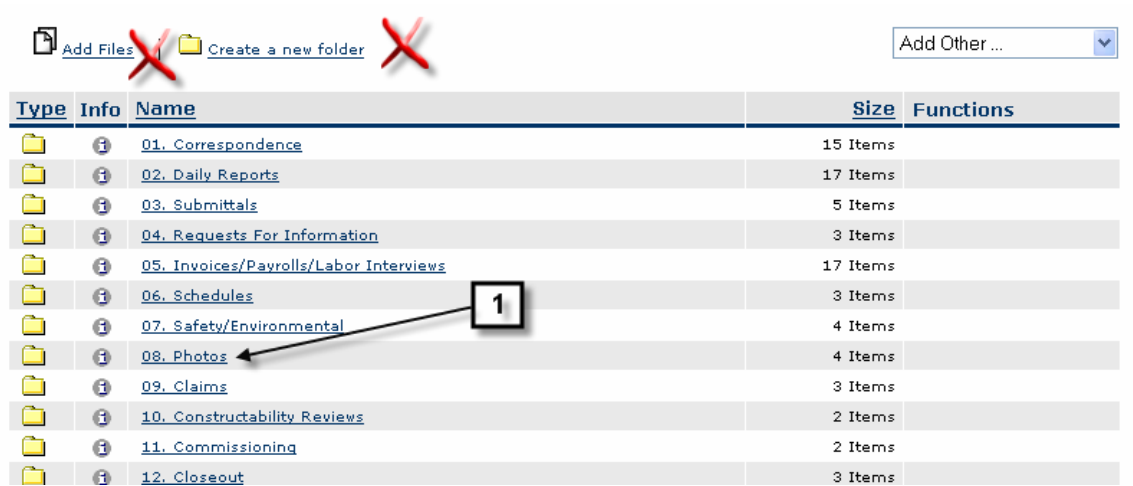


Type	Info	Name	Size	Functions
Folder	Info	01. Correspondence	15 Items	
Folder	Info	02. Daily Reports	17 Items	
Folder	Info	03. Submittals	5 Items	
Folder	Info	04. Requests For Information	3 Items	
Folder	Info	05. Invoices/Payrolls/Labor Interviews	17 Items	
Folder	Info	06. Schedules	3 Items	
Folder	Info	07. Safety/Environmental	4 Items	

- The user is assigned a Role for each project allowing various levels of access.
- The option to [Add Files](#) [1] and [Create a new folder](#) [2] are given only to Members of the project.

Create a Folder (Contd...)

- To remain consistent with the NAVFAC organization, **DO NOT** add any files or folders on the main Project Page. Folders or files at this level can be viewed by all users!



Type	Info	Name	Size	Functions
Folder		01. Correspondence	15 Items	
Folder		02. Daily Reports	17 Items	
Folder		03. Submittals	5 Items	
Folder		04. Requests For Information	3 Items	
Folder		05. Invoices/Payrolls/Labor Interviews	17 Items	
Folder		06. Schedules	3 Items	
Folder		07. Safety/Environmental	4 Items	
Folder		08. Photos	4 Items	
Folder		09. Claims	3 Items	
Folder		10. Constructability Reviews	2 Items	
Folder		11. Commissioning	2 Items	
Folder		12. Closeout	3 Items	

- As a demonstration on how to add a file and create a new folder, select for example the folder 08. Photos by clicking on the underlined icon [1].
Do not click on the folder icon .

Create a Folder (Contd...)

- The Photo window will appear.

The screenshot shows the PrimeContract web application interface. The top navigation bar includes 'Personal View', 'Projects', 'Search', and a 'log out' button. The user is identified as 'Kugan Superintendent' and the date is 'July 4, 2004'. The main content area is titled '08. Photos' and contains a table of folders. A box with the number '1' highlights the '8.1 Photo Upload Folder'.

Type	Info	Name	Size	Functions
Folder		8.1 Photo Upload Folder	4 Items	
Folder		8.3 Presentation Photos	1 Item	
Folder		8.4 Progress Photos (Time Lapse)	2 Items	

- Folder #8.2 is not available for contractors and A-Es. This folder is used to place a picture for ROICC reports.
- Click on folder 8.1 Photo Upload Folder. [1]
- This folder should be used when uploading any photos. Then the ROICC can transfer photos to other folders.

Create a Folder (Contd...)

- The “8.1 Photo Upload Folder” window will appear.



- From this location within the Photo Upload folder, files can be added and new folders can be created.
- To create a new folder, select the Create a new folder icon. [1]


[Create a new folder](#)

Create a Folder (Contd...)

- The following window will appear.

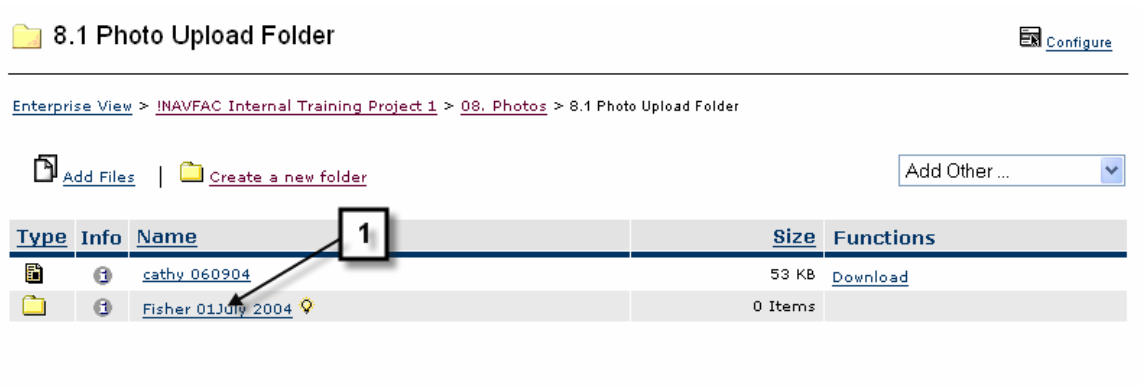
The screenshot shows the PrimeContract web application interface. At the top, there is a header with the PrimeContract logo, a 'log out' button, and a welcome message 'Welcome, SWD USER 100'. To the right of the header, there are links for 'NAVFAC Enterprise' and 'Personal View'. Below the header, a breadcrumb trail reads 'Enterprise View > INAVFAC Internal Training Project 1 > 08. Photos > 8.1 Photo Upload Folder >'. The main form area contains the following elements:

- Name:** A text input field containing 'Fisher 01 July 2004'. A callout box with the number '1' points to this field.
- Description:** A text area containing 'Training Demo 01 July 2004'. A callout box with the number '2' points to this field.
- Categories:** An empty text input field with an 'Edit...' button to its right.
- Create In:** A text input field containing '8.1 Photo Upload Folder' with a 'Browse PrimeContract...' button to its right.
- Action:** A section containing two buttons: 'Add Item' and 'Reset'. A callout box with the number '3' points to the 'Add Item' button.

- Name:** Use this to name your new folder. [1]
- Description:** User can choose to write a brief description of the folder. [2]
- Categories:** Ignore this box.
- Create In:** Ignore this box.
- Action:** When finished, click  [3].
- After selecting the Add Item icon, you will be sent back to the list of files and folders in the Photo Upload folder with the newly created folder listed.

Create a Folder (Contd...)

- The “8.1 Photo Upload Folder” window will appear.



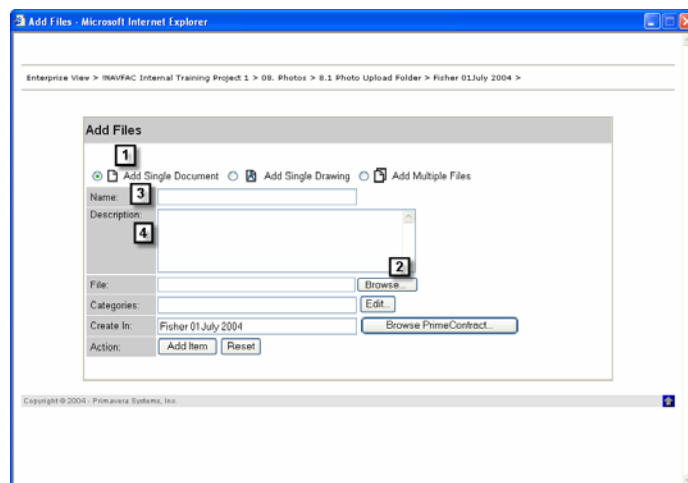
- To add a file into the created folder, select the folder that you created by clicking on the [link](#) [1]

Add a File

- The following window will appear.



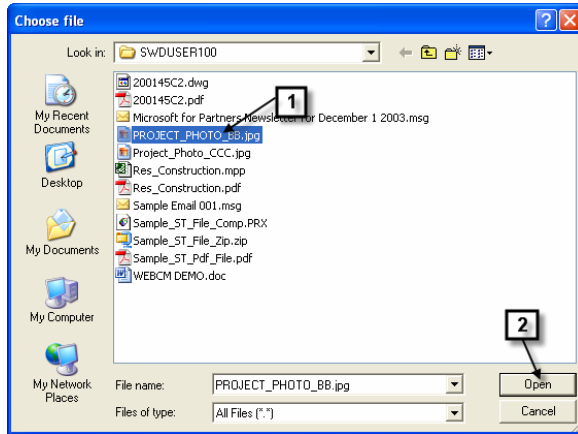
- Click on Add Files link. [1]
- The following window will appear.



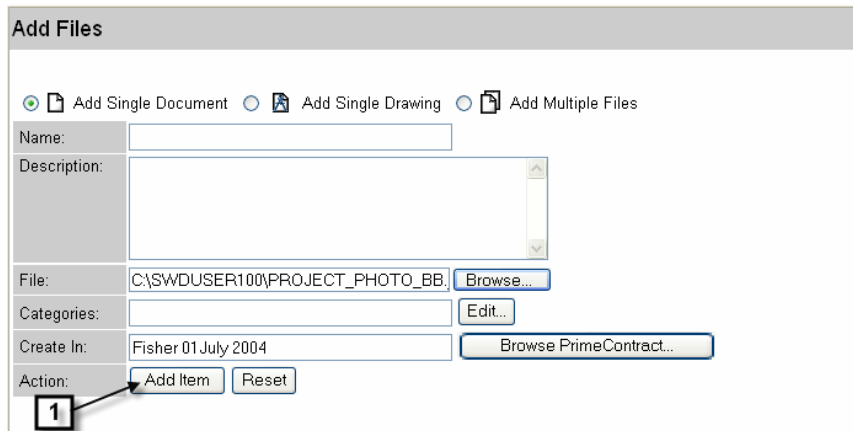
- This process is similar to creating a new folder.
- Select ☒ Add Single Document [1]
- Click to locate the file desired to be uploaded. [Your instructor will provide this information] [2].

Add a File (Contd...)

- The “Choose file” window will appear.



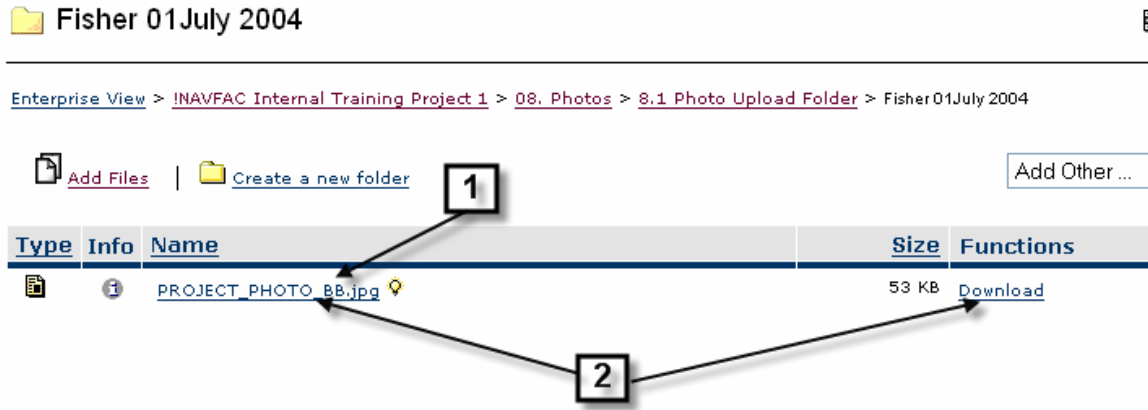
- Select the file by single clicking the file title [1], and then click on Open. [2]
- The user will be directed back to the file upload window.



- Click  [1]

Add a File (Contd...)

- The user will be directed back to the main Folder.



- The picture will now be added to the folder.
- To view the file, click on the link [1] or click on Download [2].
- This process is the same for any document (i.e., PDF, Word Document, Excel, Drawings).
- For Adding Multiple Files, see Appendix A.